4.4 Customer Relations Management Tools

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Delaware FACTS II needs an outstanding Customer Relations Management Tool to demonstrate advanced complaints management capability, distribute surveys and receive effective feedback. Being Web-based, our solution is accessible over the Internet and provides customers an opportunity to easily interact with the application and its sponsors - you. It enables DSCYF to view complaints, feedback surveys and assessments positively and as an opportunity to improve underlying operations.

For a State Government agency such as DSCYF that is involved in delivering citizen centric services, responding effectively to citizen's concerns and questions is crucial to improving satisfaction of the population it serves. In addition, federal requirements such as **National Youth in Transition Database (NYTD)** require States to engage in outreach to current and former clients.

The goal of such data collection and response mechanism is varied:

- To track the quality of services States provide to clients
- To provide an alternate path for clients to interact with the agency
- To provide a mechanism for service providers to interact with the agency

Deloitte SACWIS systems incorporate a number of CRM type functions designed to better engage a number of agency stakeholders.

Our DC FACES.NET and Alabama SACWIS contain functionality to engage the provider community in recording the provision of services to children directly into the system.

In order to support National Youth in Transition Database legislation, Deloitte has constructed online survey functionality for Texas, Alabama and the District of Columbia.

In the District of Columbia, this functionality will be implemented in February 2011 to enable our client, District of Columbia Child and Family Services Agency (CFSA), to interact with the customers it serves. In developing this functionality, we identified a number of significant benefits. These are shown in the table below.

Benefits	Features
Customer Benefits	• Customers register and receive a timely response to their complaints and information requests. These will no longer be lost in the organization, reducing delays and frustration for customers • Customers receive high quality and quick responses to complaints and information requests from staff that are empathetic and committed to providing the best possible outcome. • Customers have visibility of the progress on their complaint/information request throughout the process, meaning they won't need to contact to enquire about the status of their complaint/information request.
Organization Benefits	• Staff persons that are already committed to providing excellent customer service are better supported by an organizational culture that promotes taking ownership of complaints. • Enhanced reputation as customers receive better service when making a complaint or providing a feedback and begin to experience fewer issues.
Productivity Benefits	• Staff spends less time receiving and chasing up responses to complaints which frees up their time to dedicate to other, more value-added activities. • The baseline performance for handling complaints can be measured and as a result introduce initiatives to improve their performance.

Table 4.4-1. Benefits and Features of CRM Tool.

Meeting Your Customer Relations Management Requirements - Complaint Management and Online Surveys

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The Department encourages Bidders to describe any Customer Relations Management functionality that exists in their solutions, to support ongoing customer communications and related Federal requirements.

Deloitte leverages its experience in implementing CRM solutions for numerous public and private sector clients for Delaware FACTS II solution in order to provide customer interaction management and online surveys to meet your requirements. The solution provides features to collect data and generate reports. Delaware FACTS II also includes tracking, resolution and reporting capability.

Our solution provides categorized view of contacts, integrated alerts, notification and automated escalations. The reporting module of Delaware FACTS II solution provides the trend analysis reports to identify specific issues and feedback. The figure below depicts the composition of Delaware FACTS II CRM functionality.

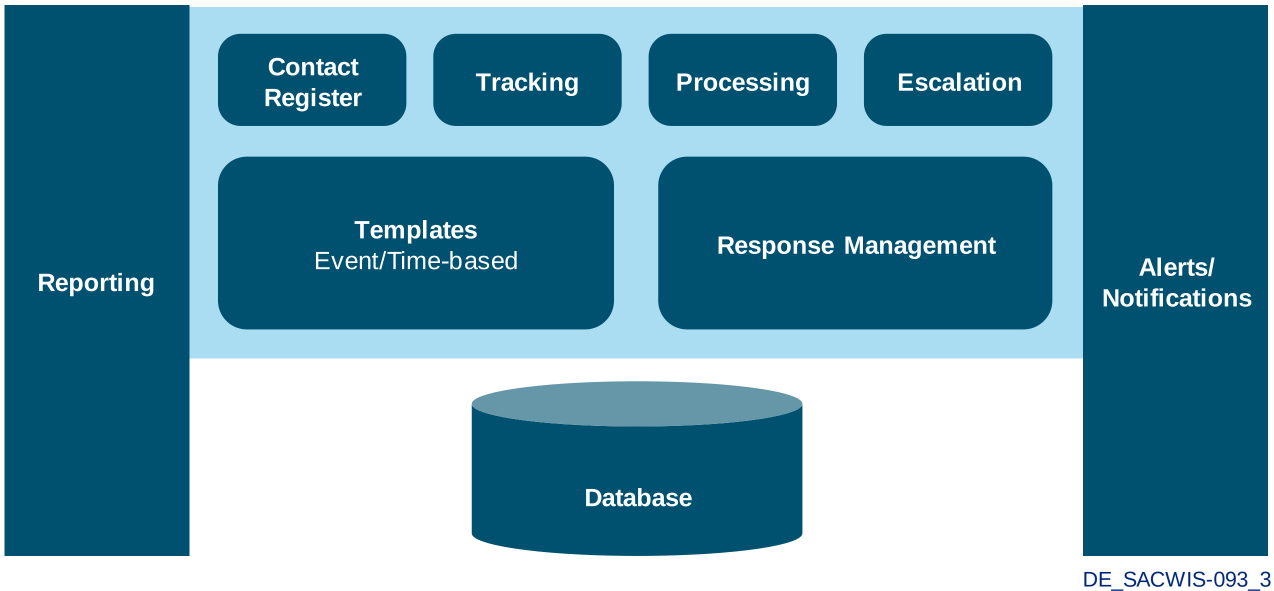

Figure 4.4-1. Customer Relationship Management Process.
A comprehensive functionality to meet all the key requirements of Delaware FACTS II.

Following are the details of each component in complaint management and survey modules

Contact Register. This module captures the contact information and stores the contact in the database. This is achieved by exposing web pages to customers who access it over the Internet and register contacts using an online form. Contacts may take the form of:

- Comments
- Surveys
- Complaints

Tracking. This module allows tracking of contact status: "Open", "Close", "Incomplete", "Not Started" etc.

DC FACES.NET screens allow users to track the status of contacts. Items, such as surveys, that are past due date are highlighted on the screen, enabling the staff person to take appropriate action.

For example, if a survey has not been submitted on time then it is brought to the attention of the social worker so that they may take next course of action; such as sending a reminder to the customer.

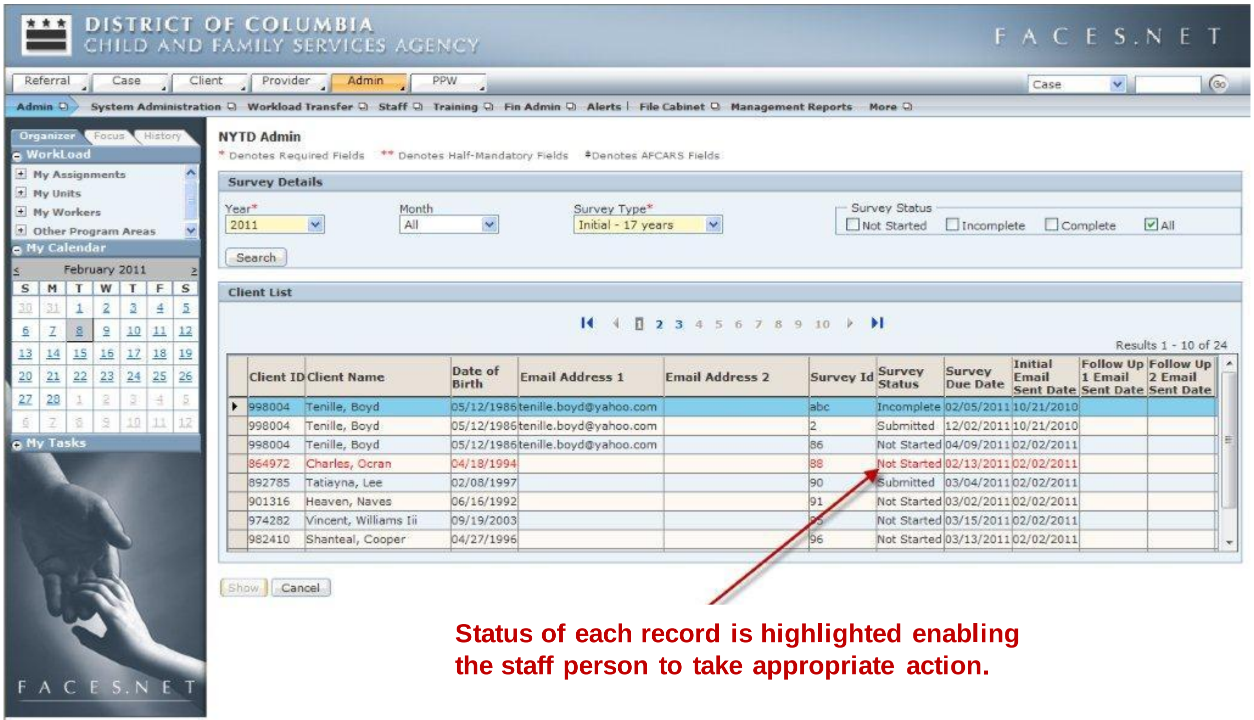

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Figure 4.4-2. NYTD Admin Screen
Screen to track status of surveys and take appropriate action if needed. The screen also allows staff person to search and filter records based on time, survey types and statuses.

Processing. This module processes the data received from customers. It automatically categorizes and routes the complaints and feedback received from the customers to the appropriate staff persons and vice versa.

Escalation. This module utilizes the workflow engine to escalate a contact if it is not acted upon within a defined time frame. Levels of escalation and person responsible at each level can be defined and configured based on the organizational hierarchy.

Template. Templates are used to generate forms and surveys. Templates consist of questions, objective answers and help associated with each question. This data can be easily modified which makes templates highly configurable.

For example, the NYTD survey, questions can be easily added, removed or modified into the database without modifying the underlying code.

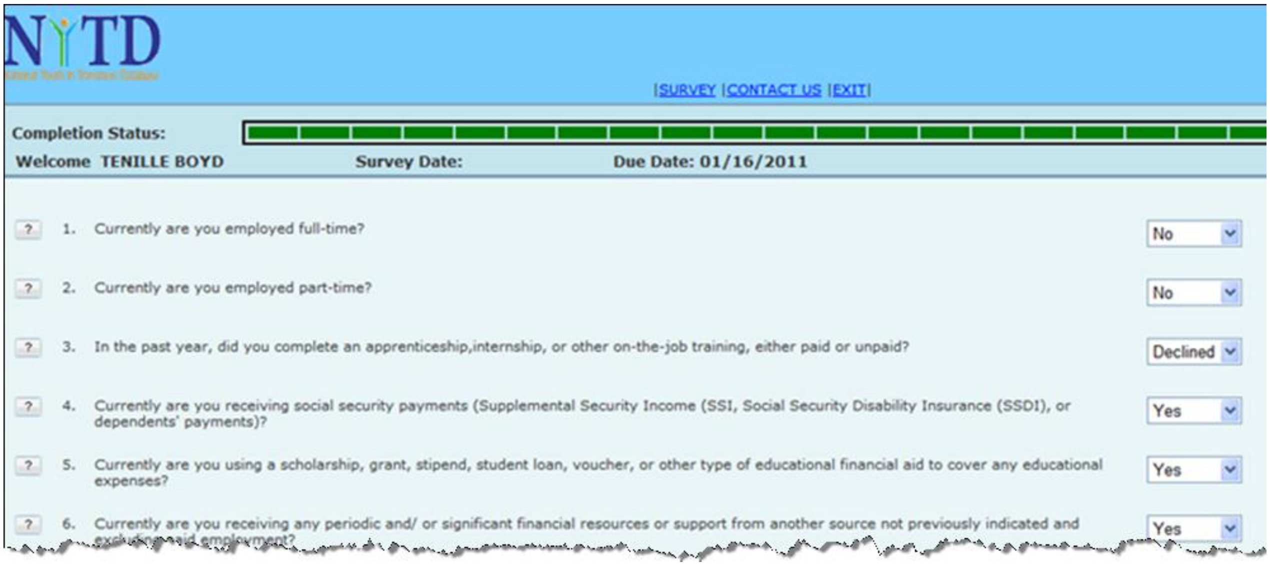

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Figure 4.4-3. Screen generated from a template
The screen prompts customer to provide feedback on several data points. Each data point or question and the corresponding answers are based on a pre defined template that is stored in the database enabling easy customization of the same template for multiple purpose.

Response Management. This module manages the responses received from the survey participants. It also manages the complaint received from the customers. The survey responses and customer complaints are stored in the database so that they can be retrieved for further analysis. This module can also be configured to send automated replies to customers depending upon the responses received.

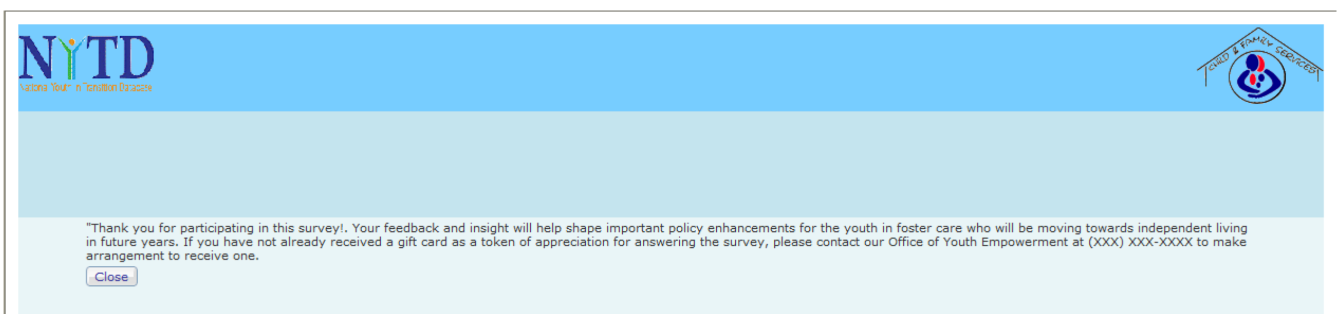

Figure 4.4-4. Responding to the customer's feedback
CRM Response Management module scans the database for completed items and automatically responds by sending an email to customers who provided feedback.

Alerts and Notifications. This is a common module used across the application go generate alerts and notifications. The same module is used for CRM to trigger necessary alerts and notifications, for example, if a registered complaint has not been addressed within a pre-configured time frame or a user has not responded to a federally mandated survey then an alert is created for the worker to ensure that it is followed-up appropriately.

For example, if a complaint is submitted by a customer, an alert is sent to the worker who would act on that complaint.

In summary, Deloitte has constructed a comprehensive set of CRM functionality, which includes receiving feedback from the customers, within DC FACES.NET that is made available to you to support outreach to citizens and contact management.

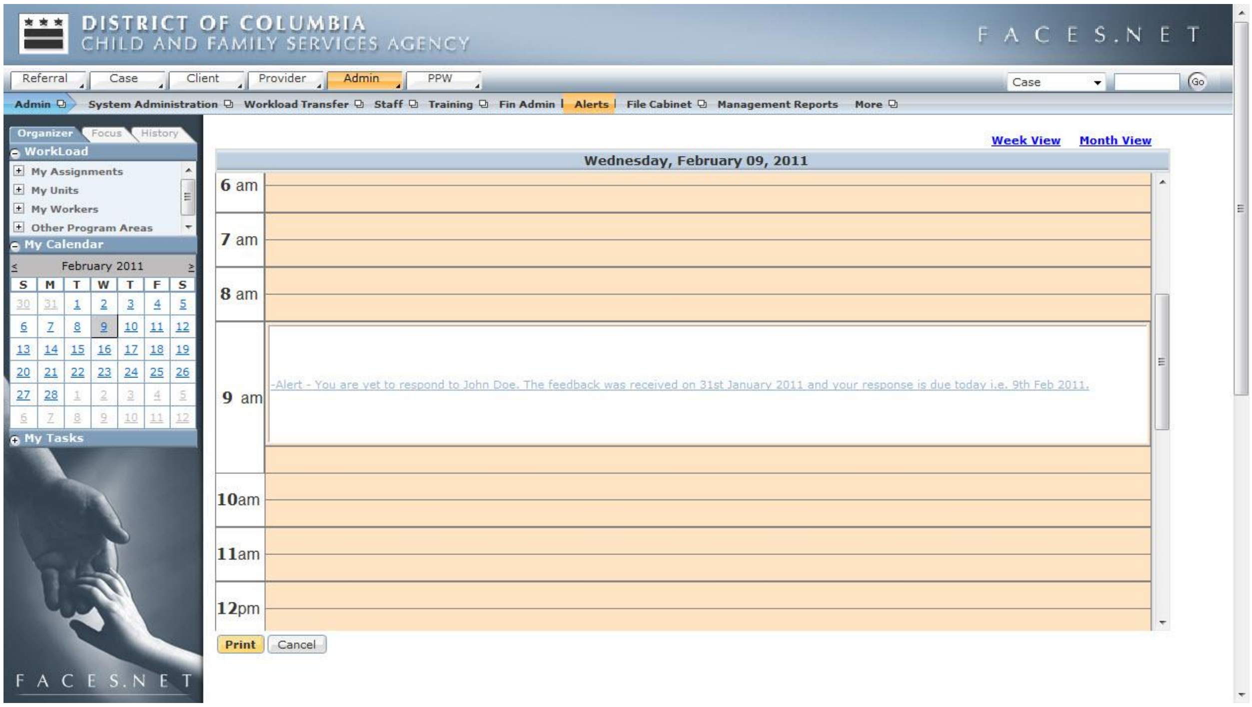

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Figure 4.4-5. Alerts Screen
Staff person is automatically alerted at various stages for CRM.

Reporting. This is also a common module used across the application. For CRM, this is used to generate reports on Complaints and Survey data for trend analysis. We use a robust SAP Business Objects toolset to generate reports that help DSCYF users make informed decisions.